Qualtrics Reporting Tools

Reporting Beta
Reporting Beta is Qualtrics’ new reporting tool. This is the recommended tool for creating reports in Qualtrics.

Creating New Reports

1. In the My Surveys tab, select the survey from which you want to create the report. Then, select the Survey.
2. Click the Reporting tab
3. Click the Create New Report button.
4. Type the Report Name, select a Folder, and then click Create.
5. Select a layout from one of the four options provided.
6. Select questions that you want to use in the report.

7. Click **Generate Report**.

**Adding Tables**

1. Click **New Table**. For more control over its placement, drag the **New Table** button directly onto your report.
2. If Qualtrics prompts you for a data source, click the **Select Data Source** or **Select Item** drop-down to specify where the table data should come from.

**Changing the Table Type**

A variety of table types are available, depending on the type of data being displayed. Click **Table Type** to select a different type.
The following table options are available:

- **Default**: This table shows the choices, the number of responses, and the percent of responses for each choice.
- **Statistics**: This table shows basic statistics, including Min Value, Max Value, Mean, Variance, Standard Deviation, and Number of Respondents. Optionally, you can add a Top Box and Bottom Box, and a Net Promoter Score (NPS) will automatically be calculated.
- **Table Other Text**: This shows the entered text for a text box appended to a non-text answer choice (for example, a text box on an “Other” choice).
- **Text Analysis**: This displays a table of the top ten words used and the count of their usage. Clicking View More will display a comprehensive list, which can be exported to Excel.
- **Cross Tab**: If you have created a cross tab in the Cross Tabulation area of the tool, you can select it here and display it in your report. You can also create a new cross tabulation from here.

**Setting the Table Options**

Click the **Table Options** button to access the following features:

- **Font**: Change the font style, size, and color.
- **Look and Feel**: Click a thumbnail to change the general appearance of the graph.
- **Decimal Places**: Choose how many decimal places are used when displaying values. Two is the default selection.
- **Transpose**: Reverse the columns and rows of the table.
- **Sort By**: Choose a column by which to sort the table.
- **Row Limit**: Specify how many rows of your table are displayed. This is useful for large tables that do not fit well on a single page. You can specify between one and ten rows. No limit is the default selection. Show/Hide Rows might be better to use if you want to spread the table across multiple pages of the report.
- **Show/Hide Columns:** Choose which columns to display in the table.
- **Show/Hide Rows:** Choose which rows to display in the table.
- **Data Format:** Base the table on the count, percent, or mean.
- **Uniform Cells:** Set each cell in the table to have equal width.
- **Expand To Height:** Space out the table rows to fill the entire space the table is allotted. This is selected by default.
- **Export Table To:** Export the table to PDF, Microsoft Excel, Microsoft Powerpoint, or Microsoft Word.
- **Clear Properties:** Revert to the default table settings.

**Changing the Table Layout**

Access basic settings for how the table appears on the page. The following options are available:

- **Show On All Pages:** Show the selected table on all pages of the report.
- **Always On Top:** Specify that the table always shows on top when it overlaps with other page items.
- **Always On Bottom:** Specify that the table always shows on bottom when it overlaps with other page items.
- **Add Description:** Automatically add the question text for the question the table represents. Double-click the text to edit as needed.
- **Center Within Page Horizontal:** Center the table horizontally on the page.
- **Center Within Page Vertical:** Center the table vertically on the page.
- **Reapply Layout:** After making changes, you can apply the original layout back to the table using this option.
- **Remove Item:** Removes the selected table from the page.
Tables also provide the ability to adjust the column headers. Click a table heading to edit Header Options or Column Options:

- **Header Options:** Adjust the font size, style or color, or rename the header.

- **Column Options:** Adjust the font size, style or color, and change the cell’s text alignment to left, center, or right.
**Adding Graphs**

1. Click the **New Graph** page item icon. For more control over its placement, click and drag the **New Graph** page icon directly onto your report.

2. If Qualtrics prompts you for a data source, click the **Select Data Source** or **Select Item** drop-down to specify where the graph data should come from.
Changing the Graph Type

A variety of graph types are available to choose from including bar charts, stack charts, gauges, and pie charts. Click the **Graph Type** drop-down to select a different type:

![Graph Type drop-down](image)

Setting the Graph Options

Each graph has an extensive list of customization options. To edit options for the entire graph, select **Graph Options**. To edit options for a single data source, select **Data Source** and click the **Graph Icon** next to any data source. The following options are available:

- **Graph Type**: This gives the same options as the main Graph Type button, but will only change it for the selected graph.
- **Font**: Change the font style, size, and color.
- **Colors**: Change the graph’s colors. The left-most color is the primary color and the rest are secondary colors that will be used as needed.
- **3D Depth**: Adjust the thickness of the 3D aspect of the graph’s columns or elements.
- **Opacity**: Adjust the amount of transparency or translucence with which to display the graph.
- **Show Values**: Display the values of each element on the graph.
- **Truncate Labels**: Shorten longer labels to give a cleaner appearance.
- **Reverse Data Layers**: Reverse the order data layers are displayed on the graph.
- **Swap Labels With Legend Keys**: Use a legend to label the graph instead of labeling along the graph axis.
- **Use Multi-Colored Bars**: Use a unique color for each bar on the graph rather than one color per data source.
- **Axis and Grid Lines**: Toggle the X and Y axes, X and Y grid lines, and the Label and Number axes.
- **Axis Scale Limit**: Set a custom scale limit rather than using the automatically chosen axis scale. This typically refers to the Y axis.
• **Show/Hide Legend**: Top is the default, but you can change the position of the legend or hide it altogether.
• **Decimal Places**: Choose how many decimal places are used when displaying values. Two is the default selection.
• **Sort Data By**: Choose to sort the graph by Choices, Series, Labels, or Keys.
• **Show/Hide Columns**: Choose particular choices to not display in the graph.
• **Data Format**: Choose if the graph should be based on the response Count, Percent, Mean, or Standard Deviation.
• **Clear Properties**: Revert to the default graph settings.

**Tweaking the Graph Layout**

Access basic settings for how the graph appears on the page. The following options are available:

• **Show On All Pages**: Show the selected graph on all pages of the report.
• **Always On Top**: Specify that the graph always shows on top when it overlaps with other page items.
• **Always On Bottom**: Specify that the graph always shows on bottom when it overlaps with other page items.
• **Add Description**: Automatically add the question text for the question the graph represents. Double click the text to edit as needed.
• **Center Within Page Horizontal**: Center the graph horizontally on the page.
• **Center Within Page Vertical**: Center the graph vertically on the page.
• **Reapply Layout**: Refresh the graph layout after making changes.
• **Remove Item**: Removes the selected graph from the page.
More Information

- Right-clicking on a graph will bring up the same editing and layout options, plus the option to create a new drill down report based upon its data.
- You can change a graph’s labels by clicking directly on them.
- For best results when working with multiple data sources on one graph, either make sure each source asks the same question and has the same graph type, or have each source ask a different question, and have a different graph type.
- Graphs automatically adjust the axis limit. If you want to control the axis limit, do the following:
  1. Click on the graph to select it.
  2. Click the Graph Options button.
  3. Hover over Axis Scale Limit. “Use Auto Scale Limit” is automatically selected.
  4. Select one of the other options to set the limit on the Sum, Mean, or Standard Deviation.
  5. Click “change” to alter the limit.

Adding Text Boxes

Click the **New Text** button to add a text box, which can be used to pull in data about a question or report item, or display custom text.

Text can be styled using the **Rich Text Editor** options available at the top of the report.
Click **Data Source** to specify which text to use:

- **Date:** Display the Current Date or the Report’s Last Modified Date. You can also choose from various date formats to display it best for your region.
- **Text:** Type your own custom information into the text box.
- **Survey Question:** Display the text of a question.
- **Page Information:** Display a Page Number, Export Tag, or Page Description.
- **Item Information:** Display information about an item in your report. For example, this can be a header for a chart or graph.

Click **Text Options** to adjust the style of your text:

- **Font:** Change the font style, size, or color.
- **Bold:** Toggle bold formatting.
- **Italics:** Toggle italic formatting.
- **Background Color:** Specify a background color for the text box.
- **Border Color:** Specify a color for the text box border.
- **Rounded Corners:** Add rounded corners to the text box.
- **Padding:** Adjust the space between the text and the edge of the text box.
- **Alignment:** Left, right, or center align the text.
- **Vertical Alignment:** Top, bottom, or middle align the text.
- **Clear Properties:** Revert to the default text settings.
Click Layout to access the following options:

- **Show On All Pages**: Show the selected text item on all pages of the report.
- **Always On Top**: Specify that the text item always shows on top when it overlaps with other page items.
- **Always On Bottom**: Specify that the text item always shows on bottom when it overlaps with other page items.
- **Center Within Page Horizontal**: Center the text item horizontally on the page.
- **Center Within Page Vertical**: Center the text item vertically on the page.
- **Reapply Layout**: Refresh the text layout after making changes.
- **Remove Item**: Removes the selected text item from the page.

### Inserting Images Into a Report

Add an image by dragging an image file from your computer directly onto the report, or by clicking the **Add Image** icon.
Right-click on the image for the following layout options:

- **Show On All Pages**: Show the selected image on all pages of the report.
- **Always On Top**: Specify that the image always shows on top when it overlaps with other page items.
- **Always On Bottom**: Specify that the image item always shows on bottom when it overlaps with other page items.
- **Reapply Layout**: After making changes, you can apply the original layout back to the image using this option.
- **Remove Item**: Delete the image.

**Setting General Report Options**

Report options are available at the top right of the reporting toolbar. From here you can make changes to the entire report, as opposed to just a specific page item.
The following options are available:

- **Global Report Styles:**
  - **Font:** Adjust the font style, size, and color for the entire report. This will not override any manual changes you made to specific page items.
  - **Graph Options:** Allows you to change the Graph Type and Graph Options for the entire report, where possible. This will not override any manual changes you made to specific page items.
  - **Table Options:** Allows you to change the Table Options for all tables in the report. This will not override any manual changes you made to specific page items.
  - **Report Theme:** Select no theme or use the default Qualtrics theme, which is the simple formatting around the question text.
  - **Snap to Grid:** Sets an invisible grid on the report pages. Use the Grid Size field to set the distance apart of the grid lines.

- **Page Size:** Toggle the page size between the default Letter, ISO A Series, North American, and custom PowerPoint sizes.

- **Page Orientation:** Select Portrait (default) or Landscape page orientation for the entire report. This can also be adjusted on a page by page basis as needed using the Page Options button for a particular page.

- **Page Numbering:** Number the pages sequentially or by showing the Export Tag for the first question being represented on that page. No numbering is the default.

- **Template Manager (Borders & Margins):** Create, manage and apply page templates.
  - **Template Name:** Name used to identify template for future use.
  - **Settings:**
    - **Locked:** Prevent changes from being made to the template.
    - **Master Account Template:** All reports in the account start with this template applied.
    - **Master Organization Template:** All reports for all users under your organization will start with this template applied.
  - **Margins:** Set specific margin distances for each side of the paper.
  - **Borders:** Set specific border thickness, color, and distance from paper edge.
  - **Edit This Template:** Takes you into a report view, where you can add some page items (like Shapes) to be the default on each report page.
  - **Delete This Template:** Remove the template from your list of available templates.

- **Tag Display Logic:** Allows you to add a Tag Group. Adding a tag group is the equivalent of creating a copy of the report’s pages. You can then click the Edit tagged pages button to edit the report (edit text, graphs, tables), specific to that tag group. The logic you then set on your tag group determines if that set of pages should be displayed, as opposed to another tag group.

- **Rename Report:** Change the name of the report.

- **Copy Report:** Create an exact replica of the current report. This can also be done in the My Reports view.

- **Delete Report:** Delete this report. This can also be done in the My Reports view.

- **Reorder Pages:** Shows all pages in thumbnail view, where you can click and drag them into the desired positions.

- **Save to File:** Exports the survey as a Qualtrics Report File (.qrf), which you can store as a backup or send to someone. The .qrf file can be imported using the Import Report feature under Report Options, working as a report template for other data sources.

- **Import Report:** Import a Qualtrics Report File (.qrf). The .qrf can function as a template for other reports. Export the report using the Save to File feature under Report Options.
Exporting and Sharing Reports

Use the Share menu to publish your report to the web, distribute your report with the Email Scheduler, or export your report to PDF, Excel, PowerPoint, or Word.